

## CSLL - Caseload List

```

CAFSCSLL                CASELOAD LIST                07/05/2006   14:49
USER ID : CS4566                PAGE NO:   3

DISPLAY C=CLIENTS,R=REPORTS OR B=BOTH: B    VIEWING CASELOAD OF USER: CS4566
TO SELECT, ENTER S=SELECT, R=RELEASE OR T=TRANSFER

      REPORT/
SEL CAPS-ID  NAME                --ASSIGNMENT--- PERM ALRT R&R/
      DATE      TYP  GOAL IND  CLNT  CPHL
- 00002058 SCHAFFER, JEREMY      03/10/99      A              C
- 00002059 SCHAFFER, MARY A      03/10/99      A              C
- 00002082 SMITH, JOAN           03/10/99      A              C
- 00002088 WASHINGTON, CAIN         03/10/99      A              C      P
- 00001028 ABBOTT BILLY          07/05/06      R              R
- 00001006 CARL CLARK              03/10/99      A              R
- 00001005 CAROLYN HAMMOND          03/10/99      A              R
- 00001007 HOPE ROBINSON          03/10/99      A              R
- 00001004 JUANITA GARCIA            03/10/99      A              R
- 00001002 LARRY CARSONE              03/10/99      A              R
- 00001003 OLE AND ANN GUSTOVSON      03/10/99      A              R
- 00001001 PATRICIA KASKE          03/10/99      P              R

PINK HIGHLIGHTED RECORDS INDICATE READ-ONLY ACCESS

```

- The Caseload List screen is used to select an open or closed client, a referral or a provider to work on or to transfer authority to another worker
- Enter a CASE TYPE and CAPS will display the list of clients/referrals/providers assigned to your caseload and specific information relating to the type you have indicated
- When a record is selected with an S, the client, provider or report is activated (loaded into the global record)
  - When ENTER is pressed, CLID, FACD or RRD1 will be displayed depending on if the selection is a client, a provider or a report
  - Any screen accessed after this selection will contain data on the selected client, provider or report
- If the user chooses the option to transfer a client by selecting with a T, the AXED (Assignment Detail) screen will be displayed
  - Multiple transfers or the transfer of an entire caseload is accomplished by selection of each client with the option (T)
  - The user will then cycle through transfer screen for each selected client, provider or report to enter the new worker number for transfer

## ALER - Alerts

```
CAFSALER                ALERTS                05/28/2008    15:32
USER ID : C74142SW                PAGE NO: 19    MORE

SEL - TO SELECT, ENTER S=SELECT, M=MODIFY, D=DELETE (USER ONLY) OR A=ADD ---
- CODE:          ID#:          TYPE:          DELETABLE:
  DUE DATE:          ACTIVE DATE:          SCREEN:          ALERT TEXT:

-----
DSPLY ALRT TYP (C,P,R,W):          ID#:          VIEW ALRTS FOR USER: C74142SW
TO SELECT, ENTER S=SELECT, D=DELETE (USER ONLY) OR I=INQUIRE

SEL  CODE    DATE    TYP    ID #    NAME
-   W01007  01/15/08  C 00001347  SECURITY, JANE
      WORKER C82123  HAS ACCESSED SECURED CLIENT      1347
-   S02005  01/03/08  C 00001440  WILSON, MARLENE
      FCRC DUE 01/03/2008
-   S05001  01/03/08  C 00001433  HENNINGSON, BRYSON
      CHILD SUPPORT REFERRAL MUST BE DONE BY 04/02/2008
-   C01011  01/02/08  C 00001002  HOLLING, KYLE F
      IV-E FINDINGS ARE DUE FOR CAPS ID 00001002 ON 03/02/2008.
-   S02015  01/01/08  C 00001306  IVE, NAOMI
      ANNUAL HOME VISIT DUE NO LATER THAN 01/01/2008

                                           PATH: █
```

- The alert screen displays messages that have been created by the system or by the worker, pertaining to the workers cases
  - To view the entire alert, select it with an “I” to display at the top half of the screen
- Alerts are triggered by events, due dates and errors. Examples of alerts are:
  - Notify the worker of an upcoming review date
  - Notify the worker when a client’s service eligibility changes
  - Notify the worker that certain eligibility information needs to be completed
  - Notify the worker of an upcoming court date
  - Notify the worker that payment approval over 5 days old
- Each alert will be displayed at a pre-set number of days prior to the due date as defined in the Code Table
- An alert will remain until a required action is taken, then CAPS or the worker will delete it by typing a “D” on the select line
  - If the alert is not a deletable alert, the worker must select it with an “S”
  - The worker will be taken to the appropriate screen to take action on that alert
- To create an alert, enter an “A” in the select field, at the top of the screen, and all of the information needed pertaining to the type of alert that you are trying to create

- To DELETE an alert, enter a “D” at the appropriate line and press ENTER
  - You may delete alerts that you have created yourself and certain system generated alerts which have been defined as deletable
- To limit the alerts that are viewed, a worker may indicate the alert type (C, P, R, W) or type in the ID of the Client, Provider/Payment, Report, or any Worker generated alerts

## STFL - Staff List

CAFSSTFL		STAFF LIST		07/06/2006		14:46	
USER ID : C84142				PAGE NO:		1	
TO SELECT, ENTER A=ALERTS, C=CLIENT CASELOAD OR F=FACILITY CASELOAD							
SEL	WORKER ID	NAME	CLIENTS	R/R'S	FACILITIES	ALERTS	
-	C7TR01	OFFICER, PROBATION	5				
-	C7TR02	TWO, TRAINER	2				
-	C7TR03	THREE, TRAINER					
-	C7TR04	FOUR, TRAINER					
-	C7TR05	FIVE, TRAINER					
-	C7TR06	SIX, TRAINER					
-	C7TR07	SEVEN, TRAINER					
-	C7TR08	EIGHT, TRAINER					
-	C7TR09	NINE, TRAINER					
-	C7TR10	TEN, TRAINER					
-	C7TR11	ELEVEN, TRAINER					
-	C7TR12	TWELVE, TRAINER					
-	C7TR13	THIRTEEN, TRAINER			2		
-	C7TR14	FOURTEEN, TRAINER					
-	C84142	HOLLING, PAULA	1		19		
PATH: █							

- STFL displays all of the workers under the supervision of the supervisor who is logged on and the total number of clients, report/referrals, facilities and alerts in each of their caseloads
- All data fields are display only
- If a worker line is selected with a “C”, that workers CSLL (Caseload List) screen will be displayed
- If a worker line is selected with an “F”, that workers FCLL (Facility Caseload List) screen will be displayed
- If a worker line is selected with an “A”, that workers ALER (Alerts) screen will be displayed

## SEAL - See All Client Screens

```
CAFSSEAL          SEE ALL CLIENT SCREENS          07/06/2006   14:47
USER ID : CS4566                                     PAGE NO: 001
CAPS ID : 00002084   00   NAME: FURST, EVE

TO SELECT, ENTER S=SELECT

  SCREEN                               SCREEN
S  NAME                               S  NAME
-  ACTL  ACTIVITY LIST                 -  MEDS  MEDICAL SUMMARY
-  ADDL  ADDRESS LIST                 -  MMHD  MEDICAL/MENTAL HEALT
-  AKAD  PERSON NAME AKA DETA         -  PERD  PERSON DETAIL
-  CELL  CLIENT ELIGIBILITY L         -  PROB  PROBLEM DETAIL
-  CLID  CLIENT DETAIL                -  RELL  RELATIONSHIP LIST
-  CLPH  CLIENT PAYMENT HISTO         -  SERL  SERVICE LIST
-  CPHL  CLIENT PLACEMENT HIS         -  SIID  SEARCHS INITIAL INQU
-  CRTL  COURT LIST                  -  SPND  SPECIAL NEEDS DETAIL
-  EDHL  EDUCATION HISTORY            -  TASK  TASK DETAIL
-  EVEL  EVENT LIST
-  IARL  INITIAL ASSESSMENT A
-  ICWD  ICWA DETAIL
-  JPRL  JUVENILE PROBATION R
-  MDTD  MEDICATION DETAIL

                                           PATH: █
```

- This screen enables a worker to quickly view all the screens that have been filled out and updated on behalf of a client
- To access a particular screen, place an “S” on the select line - the system will then take you to that screen

## AXED - Assignment/Transfers Detail

```
CAFSAXED          ASSIGNMENTS/TRANSFERS DETAIL      07/05/2006   14:45
USER ID : C74142SW

    ENTER ENTITY TYPE BEING PROCESSED
      (C-CLIENT,F-FACILITY,P-PERSON OR R-REPORT): C
PROCESSING CLIENT   : 0001300
      NAME : HARRIS, MELISSA

FUNCTION   : T (ENTER A=ASSIGN, T=TRANSFER,
                R=READ ONLY, S=SHARE, P=SECURE)

FROM USER : C74142SW WORKER, SOCIAL
TO USER   : C74142S  SUPERVISOR, COUNTY

TYPE      : P (T=TEMPORARY, P=PERMANENT)

ENTER START DATE OF TRANSFER
      OR CLIENT EFFECTIVE DATE: 07/05/2006
      END DATE: 99/99/9999

IS THIS A PRIVATE ADOPTION AGENCY CLIENT (Y/N)? : N

FS900354 TO CONFIRM, PRESS F16(SHIFT+F4)          . PATH: █
```

- This screen is used to assign a client to a worker, permit another worker to share a client, grant temporary read only access, and to secure a client, report or provider.
- The process of assigning a person to a worker makes the person a client
  - Assign a person to a worker
  - Assign a client to a worker
  - Re-assign a closed client to a worker
  - Supervisor can assign a client to a worker
  - A worker can assign clients to their own caseload
- The F10 key allows you to select other persons from RELL (Relationship List) screen so multiple persons can be assigned to a worker at one time
- Assignments and Transfers
  - TRANSFERS - This grants permanent/or temporary access to another worker for a client, facility or report
  - SHARED ACCESS - This grants shared permanent/temporary write access of a client to multiple users at one time
    - To terminate shared access a R (Release) is performed on the CSLL (Caseload List) screen of the worker with shared access

- READ ONLY - This grants temporary read only access with an expiration date no greater than five days
  - You have to enter a START DATE and an END DATE
- SECURE - This allows you to secure client information so you are the only worker who has access to the client who has been secured
- The system will not allow the worker to TRANSFER a client if
  - The client has any services that have any PENDING approval status
  - The client has any payments that are in UNAPPROVED, INCOMPLETE or MAILED status. Contact Central Office if the system stops you from transferring due to payment details, as they can take care of these for you
- It is VERY IMPORTANT that if a transfer is taking place between agencies (i.e., DPHHS to DOC) that the transfer is done promptly. This does affect funding source information for the new worker if not done immediately
- When a transfer occurs, an event record is created and stored in the system

## USMD - User Maintenance Detail

```
CAFSUSMD          USER MAINTENANCE DETAIL          03/16/2010    10:24
USER ID : CS4566    MODIFY

    USER ID          : CS4566                      START DATE: 01/01/1995
                                                    TERMINATION DATE: 99/99/9999
    FIRST NAME       : MARY
    MIDDLE NAME      : CLARE
    LAST NAME        : REYNOLDS

    STAFF TYPE       : SMN  HELP DESK/CAPS STAFF
    SUPERTASKS       : N    DAY CARE ACCESS: N

    SUPERVISOR ID    : C84720  LAMKA, VERONICA
    SERVICE REGION   : 4  SOUTHWESTERN REGION
    RGN ACCESS       : N
    SERVICE COUNTIES : 025
    LOCATION         :

    TITLE            : NORTHROP GRUMMAN SYS TRAINER
    TELEPHONE        : (406) 443-8400  EXT:
    CONTACT COUNTY   : 025  LEWIS & CLARK
    EMAIL ADDRESS    : MARY.REYNOLDS@NGC.COM

SHIFT+F5=SATD                                           PATH:
```

- This screen can be accessed in order to view identifying worker information if all you have is that worker's USER ID
- With the cursor in the USER ID field, type in the C# of the worker. The following information will be displayed
  - Worker's name and staff type
  - Supervisor and Approval Task Indicator ("Y" or "N")
  - Worker's supervisor and service region/counties
  - Worker's Title
  - Worker's phone number and contact county
  - Worker's email address
- This screen is also used to identify start and termination dates for worker's on the system
- If there is a "Y" in the SUPERVISOR AND APPROVAL TASKS field, press SHIFT+F5
  - SATD (Supervisor/Approval Tasks Detail) screen will be displayed
  - You can view what approval tasks or "supertasks" this worker has in the system



## USML - User Maintenance List

```
CAFSUSML          USER MAINTENANCE LIST          07/06/2006   14:48
USER ID : CS4566                                     PAGE NO:    1

REGION :          COUNTY :
STAFF TYPE :          STARTING LAST NAME :
DISPLAY THE WORKER HISTORY FOR USER-ID :
TO SELECT, ENTER I=INQUIRE, M=MODIFY OR D=DELETE
SEL USERID  NAME                STAFF TYPE      RGN COUNTY----- PHONE
- C7TR08    EIGHT, TRAINER      CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR18    EIGHTEEN, TRAINER   CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR11    ELEVEN, TRAINER     CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR15    FIFTEEN, TRAINER    CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR05    FIVE, TRAINER       CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR04    FOUR, TRAINER       CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR14    FOURTEEN, TRAINER   CWA COUNTY OFFIC 4 025 LEWIS & CL
- C84142    HOLLING, PAULA      SPH CENTRALIZED  9 073 STATE OFFI 442-6550
- C86100    KOENIG, KELLY       CAA REGIONAL ADM 4 025 LEWIS & CL
- C7TR09    NINE, TRAINER       CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR19    NINETEEN, TRAINER   CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR01    OFFICER, PROBATION  CCO YOUTH COURT  8 074 1ST JUDICI
- CS4566    REYNOLDS, MARY      CAC COUNTY OFFIC 4 025 LEWIS & CL 443-8411
- C7TR07    SEVEN, TRAINER      CWA COUNTY OFFIC 4 025 LEWIS & CL

                                           PATH:
```

- This screen can be accessed in order to view identifying worker information
- You can search for a worker by
  - Region
  - County
  - Staff type
  - Worker's last name
  - Worker's USER ID
- You have the ability to INQUIRE only on this information. Placing an "I" on the SELECT line next to the worker's USER ID will take you to USMD (User Maintenance Detail) and will display additional worker information